February 2000

Dear EDExpress Users:

We are pleased to release EDExpress for Windows, Version 5.4.1. This service release resolves a number of issues present in the most recent EDExpress release, Version 5.4. The details of these changes are located in the section "Issues Fixed in EDExpress, Version 5.4.1."

We have enclosed the following items in this letter:

- Procedures for installing the upgraded version,

- Set of important reminders,

- List of configuration management issues we implemented in Version 5.4.1, and

- Results gathered from EDExpress benchmark testing.

What You Should Do

- Review the information attached to this letter, and

- Use the attached instructions to install Version 5.4.1 on your computer.

If You Need Further Information

The EDExpress Customer Service staff of the Central Processing System (CPS) can handle all of your EDExpress for Windows questions regarding:

- Installation issues,

- Software problem resolution,

- Software functionality, and

- Technical assistance.

You can reach them Monday through Friday, 7 a.m. – 7 p.m. (CT), at **800/330-5947**. You may also e-mail inquiries, comments, or suggestions 24 hours a day to **CPS@NCS.COM**. A representative will respond within 24 hours.

If you have technical questions about our SFA systems and software, you may want to subscribe to our e-mail listserv, SFATECH. For more information about SFATECH, look online at **http://www.ed.gov/offices/OSFAP/SFATECH/listserv.html**.

Sincerely,

CPS Customer Service

EDExpress for Windows, Version 5.4.1

The Department is pleased to announce the release of 1999-2000 EDExpress for Windows, Version 5.4.1.

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Downloading EDExpress, V 5.4.1 from the Web

The software and documentation are distributed via the Internet using the SFAdownload Web site, **http://www.SFAdownload.ed.gov**.

If you do not have access to the Internet, or you need assistance connecting to the SFAdownload Web site or downloading EDExpress in single or multiple file format, call Title IV WAN Customer Service at **800/615-1189**, or e-mail them at **T4WAN@NCS.COM** to request diskettes.

Note: Some organizations restrict their users from downloading from FTP sites. If you have trouble downloading, try again later. If you are still unable to download, contact your technical support staff to ensure you have full FTP download rights.

DOWNLOADING THE SOFTWARE TO YOUR HARD DRIVE

EDExpress, Version 5.4.1, is available on the SFAdownload Web site in two formats. You can download the entire software in one file (EDExpressV541.exe), or in two separate installments, which can then be copied to a network drive or diskettes.

Downloading the Software as One File

1. Go to the URL field located at the top of your browser's screen and type the SFAdownload Web site address: **http://www.SFAdownload.ed.gov**.

2. Follow the instructions provided and click the **Continue** button. You will be taken to a Privacy on Our Web Sites Web page.

3. Click on any of the links (or scroll down) to read information about Non-personal Information, Information from E-mails, Information collected from interactive forms, or Privacy of other records.

4. Click the **Continue** button to access the Web site containing the software you want to download. A brief description of the software is provided.

5. Click **EDExpress 2000-2001** to the left of this description. You are taken to the downloading site. Technical support for this site is provided via phone and e-mail.

6. Click the **Full Download** link to download the program that allows you to do the full installment. A **Save As…** dialog box will appear.

7. Choose the location on your hard disk to save the file, then press the **Save** button. The length of time it takes to download the software depends largely on the speed of your Internet connection. The installation process creates the program directory C:\PROGRAMFILES\EDESUITE\EDEXPRESS for Windows v5\ automatically.

Downloading the Software in Two Installments

1. Go to the URL field located at the top of your browser's screen and type the Student Financial Assistance (SFA) Download Web site address: **http://www.SFAdownload.ed.gov.**

2. Follow the instructions provided and click the **Continue** button. You will be taken to a Privacy on Our Web Sites Web page.

3. Click on any of the links (or scroll down) to read information about Non-personal Information, Information from E-mails, Information collected from interactive forms, or Privacy of other records.

4. Click the **Continue** button to access the Web site containing the software you want to download. A brief description of the software is provided.

5. Click **EDExpress 2000-2001** to the left of this description. You will be taken to the downloading site. Technical support for this site is provided via phone and e-mail.

6. Click Disk 1 to download only disk 1's data. A **Save As…** dialog box will appear.

7. Choose the location on your hard drive to save the file. Click **Save**. The length of time it takes to download the software depends largely on the speed of your Internet connection. The installation process creates the program directory: C:\PROGRAMFILES\EDESUITE\EDEXPRESS for Windows v5\ automatically.

8. Click **Disk 2** to download only disk 2's data. When the Click Disk 2 to download only disk 2's data. When the **Save As…** dialog box appears again, make sure you are saving Disk 2's data to the same location as you saved Disk 1's data.

9. Once the software disk files are downloaded to your hard disk, go to that location and double-click on **Disk 1.** Then double-click on the Setup.exe file to open and install the software.

*Disk 1 and Disk 2 are self-extracting zip files. After downloading, self-extract the files from each of these disks onto your hard drive. Then copy the extracted files onto floppy disks labeled Disk 1 through 2 respectively.

DOWNLOADING THE DOCUMENTATION

You can download the paper documentation from the Internet in both Adobe PDF and Microsoft Word format. The following types of paper documentation are available to download:

- Cover Letter

- Installation Guide

- Technical Reference

Each of these documents has the date they were posted, file size, and approximate download time. However, the length of time it takes to download a paper document depends on the speed of your Internet connection.

To download paper documentation:

1. Go to the URL field located at the top of your browser's screen and type the Student Financial Assistance (SFA) download Web site address: **http://www.SFAdownload.ed.gov**.

2. Follow the instructions provided and click the **Continue** button. You will be taken to a Privacy on Our Web Sites Web page.

3. Click on any of the links (or scroll down) to read information about Non-personal Information, Information from E-mails, Information collected from interactive forms, or Privacy of other records.

4. Click the **Continue** button to access the Web site containing the document(s) you want to download. A brief description of the documentation's software is provided.

5. Click **EDExpress 2000-2001** to the left of this description. You are taken to the downloading site. Technical support for this site is provided via phone and e-mail.

6. Click on the type of documentation you want to download.

7. If you select an Adobe PDF formatted file, click **File, Save As** from the menu bar, select a location on your hard disk, and then click the **Save** button to save the file.

8. If you select a Microsoft Word formatted file, a dialog box will appear. Click on **Save it to disk**, choose a location to save the file and press the **Save** button.

9. For either type of file, the Web site is designed to give it a default name; however, you may choose another name for the file if you want.

10. Once the paper document has been downloaded on your hard disk, go to that location and double-click on the file to open and/or print it.

Installing EDExpress, Version 5.4.1

EDExpress, Version 5.4.1 is a service release to Version 5.4. You must continue to have Windows 95, NT, or 98 as your PC operating system to run this version. You must also be in compliance with the system requirements outlined in Action Letter #2 (October 1997).

To upgrade from Version 5.4 to Version 5.4.1, you must perform the following procedures:

1. Back up your Version 5.4 database.

2. Install Version 5.4.1.

INSTALLING TO A STAND-ALONE COMPUTER

To upgrade from Version 5.4 to Version 5.4.1 on a stand-alone computer or workstation:

1. Back up your Version 5.4 database.

2. Close all running applications, including screensavers, e-mail notifiers, etc.

3. Go to **Start, Run**, and type the program directory where you downloaded the software.

4. Type the file name itself (C:\Windows\Temp\EDExpressv541.exe). Click **OK**. This will extract the necessary install files and automatically launch the install program. Mark the checkbox for the modules you use, so module fixes can also be installed.

5. Reboot your PC.

INSTALLING TO A NETWORK

If you have multiple PC workstations accessing a networked EDExpress database,

1. Copy the install file from PC to PC, running the install on each as you proceed. Or run the installation program from the network drive it is saved to.

2. Reboot each PC after you have finished installing the software.

INSTALLING THE SOFTWARE FROM DISKETTES

The primary method for installing EDExpress on your computers is by downloading the software from the SFAdownload page. If that method is unavailable to you, call Title IV WAN Customer Service at **800/615-1189**, or e-mail them at **T4WAN@NCS.COM** to request diskettes.

1. Back up your Version 5.4 database.

1. Close all Windows applications, including screensavers, e-mail notifiers, etc.

2. Insert Diskette #1 in the A: drive.

3. Select **Start** from the Task bar.

4. Select **Run** from the Start pop-up menu.

5. Type **a:\setup** at the Open entry field and click **OK**. The software is installed to the default directory C:\PROGRAM FILES\EDESUITE\EDEXPRESS for Windows v5, unless you choose another location.

6. When prompted, insert diskettes in numerical order and click **OK**.

7. Mark the checkbox for any modules you use (so module fixes can be installed).

8. EDExpress asks you a series of questions during the installation. These questions verify the location of the software on your hard drive. Each question has a default answer.

   - If the default is correct, click **Next** in response to each question.

   - If the default is not correct, select the correct answer and click **Next**.

9. When the installation program is finished installing the files, it prompts you to click the **Finish** button.

10. Reboot your PC.

Warning

You must perform your upgrades in version number order. If you have not yet updated from Version 5.1 to 5.2, or from 5.2 to 5.3, or from 5.3 to 5.4, please do so by using the above directions prior to upgrading to Version 5.4.1.

For further information regarding the EDExpress installation process, please consult the *EDExpress Installation Guide* sent with Version 5.0.

Reminders

BACK UP YOUR DATABASE WEEKLY

Before you upgrade your EDExpress to Version 5.4.1, you must back up your database so that you don't lose your data.

You should back up your EDExpress database file, EXPRES90.MDB, regularly. We recommend that you back up your files at least weekly.

EDExpress for Windows does not include a backup utility. You must use your own backup software. You should test your backup software to verify its reliability to successfully restore your backups.

OPTIMIZE YOUR DATABASE BY USING SOFTWARE UTILITIES

The EDExpress for Windows software contains database utilities that allow you to optimize your database if you encounter problems. We recommend that you repair, compact, and verify your database once a week. If all three are successful, back up the database (see section above).

Run the database utilities in the following order:

1. Repair database.

2. Compact database.

3. Verify database.

For specific information regarding repair, compact, and verify, see the appropriate section below.

RUN THE REPAIR DATABASE UTILITY

The repair database utility resolves inconsistencies (also called a database corruption) in record storage. Events such as a power outage or a LAN failure can corrupt your database if it occurs while EDExpress for Windows updates your records.

EDExpress may not detect database corruption, so if your system behaves unpredictably (for example, you start getting database error messages), use the Repair Database Utility.

Running this utility weekly helps to prevent database problems.

Warning: Before using this utility, be sure you have space on your hard drive that is at least equal to the current size of the database.

IMPROVE EDEXPRESS PERFORMANCE BY USING THE COMPACT DATABASE UTILITY

The compact database utility improves the performance of EDExpress for Windows by optimizing the database (EXPRES90.MDB) file and reclaiming space on your computer's hard drive. As you add, modify, or delete records in EDExpress for Windows, the database file can become fragmented.

Running this utility weekly makes the database files smaller and improves system performance.

Warning: Before using this utility, be sure you have hard drive space available at least equal to the current size of the database.

PREVENT PROBLEMS BY USING THE VERIFY DATABASE UTILITY

The verify database function checks for data relationship integrity in your database. If EDExpress for Windows crashes or abnormally halts processing, a record may be missing one of its associated records. Verify Database recreates the missing record.

Running this function weekly helps to prevent problems.

Warning: Before using this utility, be sure you have hard drive space available at least equal to the current size of the database.

Issues Fixed in EDExpress, Version 5.4.1

EDExpress, Version 5.4.1 resolves the following issues, which affect Direct Loan and Pell users.

DIRECT LOAN

2230	When you increase the Loan Amount Approved and Loan Amount Requested fields on a loan with the status of "A" (Accepted) and no actual disbursements, you receive a prompt asking if you wish to recalculate the anticipated gross disbursement amounts. If you answer "Yes" to this prompt, the Loan Status and the Promissory Note status is NOT updated.
2245	You can print a List-Actual Disbursements report with many records and EDExpress successfully executes the report.
2246, 2272, 2273 and 2274	The List-Actual Disbursement report displays the actual adjustment transactions (Type A and J), and the Net Adjustment Amount prints to the right of the adjustment transaction.

When you select to print List-Actual Disbursements, the subtotals (disbursement totals) print correctly. If you select the option to print the report for net amount only or for gross, fee, and net amount, the subtotal is calculated using net amounts and a net disbursement total is displayed. If you select the option to print the report for gross amount only, the subtotal is a gross disbursement total.

All total amounts on the List-Actual Disbursements are calculated and displayed as net total amounts. This includes Total Net Booked amounts, Total Net Unbooked amounts, and Total Net Disbursements amounts for all loan types.

In addition, if an adjustment transaction (Type A or J) is part of a disbursement, the net adjustment amount is used when calculating the booked and unbooked net totals.

2275	When creating a change to the Loan Period Code, EDExpress saves the change and does not update the loan status or promissory note status of the loan.
2282	When you select the export type of LOC Disbursement (DESD), EDExpress exports Disbursement Action Type "Q" transactions (Adjusted Disbursement Date) with the appropriate corresponding disbursement number even when the disbursement number is 2, 3 or 4.
2307	The Direct Loan Verify Change process allows you to resend a Loan Amount Approved and/or Anticipated Disbursement Gross Amount or Date change record to the LOC. The process was not working properly but has been corrected. Now, if you use the Verify Change process, the next time you select the export type LOC Change (DESC), the Loan Amount Amount Approved and/or the Anticipated Disbursement Gross Amount or Date change records are selected as part of the batch to be exported to the LOC.
2365	You can print a List-Anticipated Disbursements with Corresponding Actual Disbursement or Pending Actual Disbursement report, select SSN file and EDExpress successfully executes the report.

PELL

2031   When you choose to include Pell Disbursement information when printing a Pell Origination Record report, EDExpress correctly calculates the Total YTD Amount for the Disbursement information listed.

2178   The system now imports system-generated Pell Special Disbursement records sent from RFMS.

2218   The Pell YTD comparison report displays the correct column headings for Pell Disbursement discrepancy information. After the origination column headings and data prints, the report will print disbursement column headings "Disb Amount," "Disb Status," and "RFMS Stat."

2244   If you import a Pell YTD file and select "Rebuild All" for your Update option, any students with more than one accepted or corrected Pell Disbursement record will have all of their disbursement records added on the Pell Disburse tab. The columns for the previously accepted or corrected disbursements will be left blank on the tab.

2269   Student Pell Origination Records with an apostrophe as part of the name ID are now imported during the YTD import when "Rebuild All" is selected as the Update option.

2270   The Pell YTD Exception Report, which displays discrepancies between the data in the YTD file and the data in your database, correctly prints the total award amounts for all exceptions found by the import process as the Total Award Amount Exceptions.

2310   The Data Request export option for Pell YTD files allows you to designate a specific attended campus code or a reporting campus code. Schools can receive YTD data for students with or without the same reporting and attended campus codes.

EDExpress Supports These Printers

We tested the following printers that are supported in Windows NT 4.0, Windows 95, and Windows 98:

- HP LaserJet III si
- HP LaserJet 4
- HP LaserJet 4000 N
- HP LaserJet 4M

- HP LaserJet 4M Plus
- HP LaserJet 4 si
- HP LaserJet 5M

- HP LaserJet 5 si
- HP LaserJet 5 si MX
- HP LaserJet 6 MP

EDExpress Benchmarking Tests

These benchmarking tests were performed on EDExpress, Version 5.3, to measure its performance in varying processing environments.   These results will not change for version 5.4.1 but are provided for the new EDExpress user.

IMPORTS BENCHMARKING TESTS

The table below reports the benchmarking results for EDExpress import files. We tested the Import process during normal working hours using different operating systems, PC platforms, and import files (all files had approximately 400 records). We conducted these tests on a Pentium 200 with 64 MB RAM. For the network tests, the EDExpress software was on the workstation and the database was on the server. The server used is a production server with approximately 200 simultaneous users. From previous benchmarking activities, we have not seen a performance difference between the Novell 3.12 environment and the NT server environment. Thus, we list only the Novell network environment below. The Time Elapsed column indicates the measurement of time starting when you click OK in the Import dialog box and the import process begins.

Component	Operating System	Benchmarking Volume	Time Elapsed	Network
Pell – ISIR Import Add	WIN 95	1000 records	36 sec	N/A
Pell – ISIR Import Add	NT 4.0	1000 records	9 min 10 sec	Novell
Pell – ISIR Import Add	NT 4.0	1000 records	30 sec	N/A
Pell – ISIR Import Add	WIN 98	1000 records	39 sec	N/A

REPORTS BENCHMARKING TESTS

The table below reports the benchmarking results for EDExpress reports and lists. We tested these reports in Windows NT, Windows 95, and Windows 98 on HP LaserJet III, 4, 4000N, 4M, 4M Plus, 4 si, 5M, 5 si, 5 si MX, and 6 MP printers. We conducted these tests on a Pentium 200 with 64 MB RAM. The Time Elapsed column indicates the measurement of time starting when you click OK in the EDExpress Print dialog box and when the operating system (Windows NT/95/98) print dialog appears. The Benchmarking Volume is the number of records and approximate number of pages that were printed in the test.

Component	Benchmarking Volume	Operating System	Time Elapsed
Pell Disbursement List	Report	NT 4.0	2 seconds
Pell Disbursement List	Report	Win 95	2 seconds
Pell Disbursement List	Report	Win98	2 seconds
Pell Origination Record	Report	NT 4.0	2 seconds
Pell Origination Record	Report	Win95	2 seconds
Pell Origination Record	Report	Win98	2 seconds